SharpSchool
Helping Schools Succeed

Chapter 1:

SitePublish User Guide

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About SharpSchool

A t SharpSchool we specialize in providing web based technologies that help schools and districts create a stronger and more defined online presence. Our K-12 specific tools offer a range of mediums that facilitate efficient, yet secure, communication between schools and students. These tools include Content Management Systems, Learning Management Systems, Student Safe Email and many more. For more information on SharpSchool's products and services visit our website at www.sharpschool.com.

About this Guide

This user guide has been designed to help everyday users navigate through SharpSchool's system. The following chapters are divided into individual modules and contain important information in the form of *Reminders*, *Tips, Notes* and *Pitfalls*. Pay attention to these alerts as they can prevent you from making common mistakes.

Depending on the package your district/school purchased from SharpSchool, some of these modules may not apply to you. Nonetheless, individual chapters in this guide can be taken as standalone units and will not affect the overall performance of the tools and your ability to learn about them.

Who Should Use this Guide

The contents of this guide are written to be readable by users of all technical backgrounds. Primarily, this guide will be used by teachers and content authors who are responsible for managing or creating some or all pages of the organization's site.

If you have been given a training site, it is a good idea to practice the steps covered in this guide before working on your real sites. This eliminates the risk of you accidentally deleting or ruining anything on your real site.

About SitePublish

SitePublish is SharpSchool's Content Management System (CMS). This system offers a typical, non-technical web user all the tools needed to create, edit and maintain content on websites. We will go into greater detail on these tools later in the manual.

Accessing your Website

In order to use *SitePublish*, you must first log into your website. The login page to your school or district site will contain fields for username and password. The location of the login button will vary according to your website's design; however, login buttons are typically available on the upper right corner of your website.

Login

Username

Password

Login

Signup | Forgot Password

Vital Information

After logging into your website you will be taken back to the homepage. Before continuing there are a few things to keep in mind:

The Gray Tool Bar

After logging into the website, you will notice a *Gray Tool Bar* floating on the top of your page. This bar contains the tools you will need to maintain your website; it is specific to your user permissions and the page you are viewing. i.e. if you only have limited rights to edit a page, the toolbar will display fewer options.

Permissions

Some of the tools mentioned in this guide may not be available on your screen. This is due to the permission settings applied to the page you are viewing. If you are not an administrator, the gray bar will only be visible to you on pages that you are authorized to work on.

Understanding Page Types

Throughout this manual, we will keep returning to the concept of page types. A *Page Type* in *SitePublish* refers to a specific webpage with a specific module embedded in it, i.e. the Calendar Page Type will add a page with a calendar embedded in it to your website. We will go into greater detail on adding page types and modules in following chapters.

Understanding Portlets
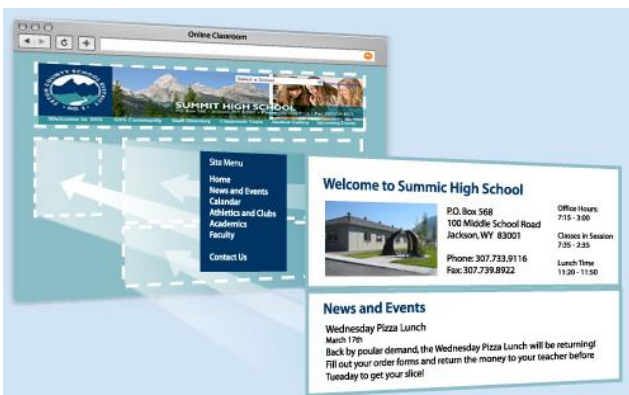
Portlets are another unique component of the system. A portlet is a web-part that divides a single webpage into unique areas of content. For instance, in the corresponding picture, each arrow refers to a specific portlet on the page. *SitePublish* users can create multiple portlets on a page to show different information. We will go into detail on defining and designing portlets later in this user guide.

Understanding Hierarchies: Parent, Sibling and Child Pages
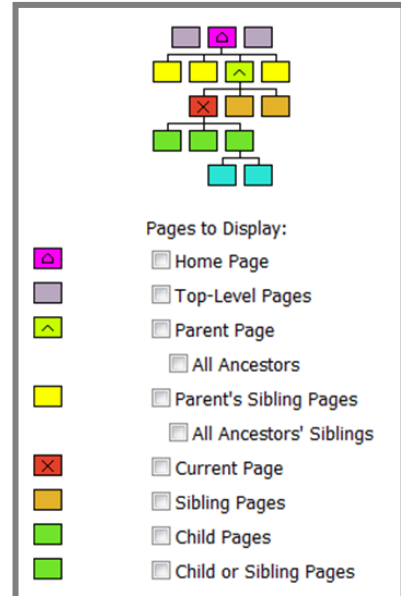
Throughout this user guide you will come across terms such as **Parent Page**, **Sibling Page** and **Child Page**. Understanding these terms is an essential component when creating the subpage hierarchy of your site.

Parent Page: A page which precedes a particular subpage. For example, if all the teacher pages of a school were published under the Staff Directory page, the Parent Page for those teacher pages would be the Staff Directory page.

Sibling Page: A page that is available on the same hierarchical tier as your current page. Let's continue the example used in the Parent Page above. If all the teacher pages are listed under the Staff Directory, then those teacher pages will be referenced as Sibling Pages to one another.

Child Page: A subpage published under your current page. Therefore, in this scenario, all the teacher pages will be considered Child Pages in reference to the Staff Directory Page.

Pages to Display:
- Home Page
- Top-Level Pages
- Parent Page
  - All Ancestors
- Parent's Sibling Pages
  - All Ancestors' Siblings
- Current Page
- Sibling Pages
- Child Pages
- Child or Sibling Pages

Introduction: The Gray Tool Bar

The *Gray Tool Bar* is divided into 6 main headings:

1) **Page Properties**

The **Page Properties** menu contains tools to help you add, edit and manage pages on your website. A detailed description of **Page Properties** is available later in this user guide.

2) **Tasks**

The **Tasks** menu is the house-keeping component of the SharpSchool system and provides page owners with information on the subpages. A detailed description of **Tasks** is available later in this user guide.

3) **Advanced**

The **Advanced** menu allows users to enhance the look and feel of their webpages by adding portlets. A detailed description of the **Advanced** menu is available later in this user guide.

4) **Administration**

The **Administration** menu is available to administrators at your organization and will not be available to all users. A detailed description of the **Administration** menu is available in *Chapter 2 – SitePublish Administrator Guide*

5) **Help**

The **Help** button offers context sensitive help for the page you are viewing.

6) **Logout**

Use this button if you wish to logout of the site.

I. Page Properties

The first heading of the **Gray Tool Bar**, the **Page Properties** menu, contains a series of system specific tools. These tools are the core of the SharpSchool system and it is essential that users learn how to navigate through them in order to use the solution:

1) Edit Page

In order to edit the content of existing pages on your website you must first go to the page you want to edit before clicking on **Check-out & Edit Page** under **Page Properties**. You will be routed to another page that is divided into three main headings:
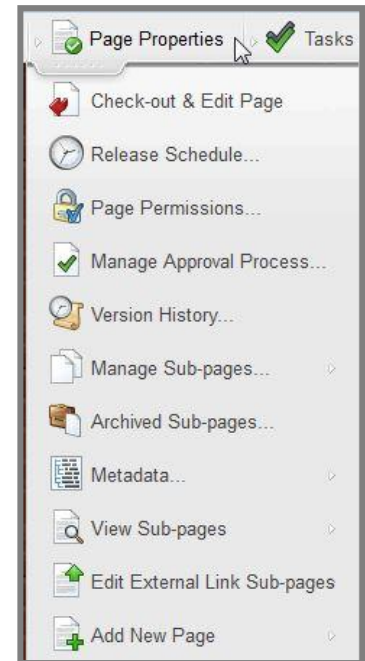
a. Page Properties

The **Page Properties** section allows you to change the title of a page on the website. Simply type in the new name of your page in the **Title** field and the system will automatically update the **Name** on the page.

b. Page Content

The Page Content section contains SharpSchool's WYSIWYG (What You See Is What You Get) Editor. The buttons in this editor are similar to the buttons in Microsoft Word®. A detailed overview of the editor has been included as an appendix to this user guide. Refer to *Appendix A* for more information.

c. Page Administration

The **Page Administration** section contains user specific information on the page. This section is divided into 4 main headings:
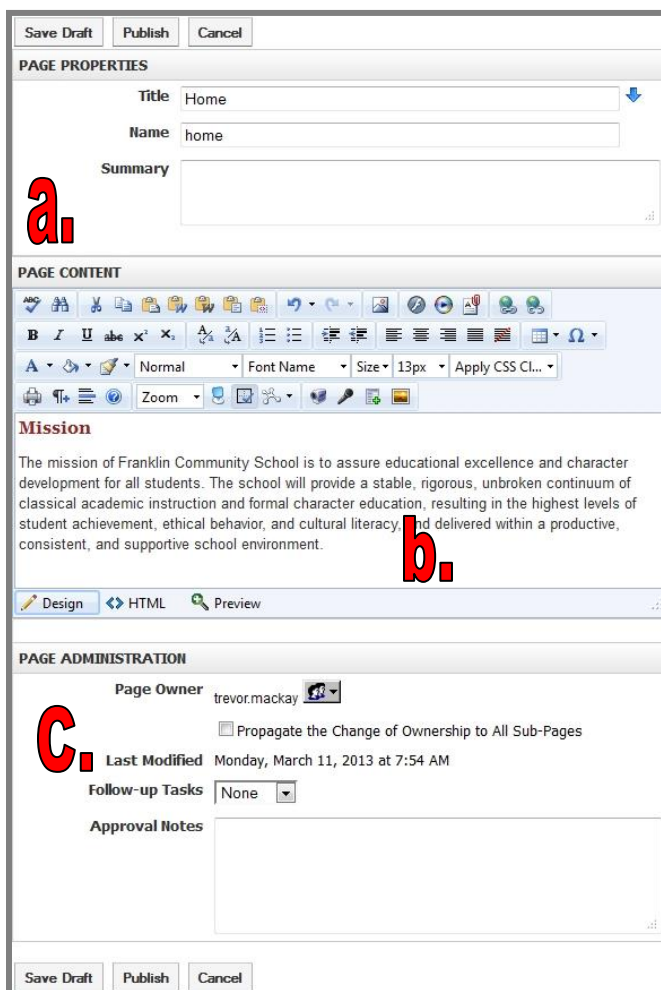
i. **Page Owner**

In institutions, the task of maintaining and updating content on websites is often distributed between different resources. The **Page Owner** field states the ownership of a page.

Users and administrators also have the ability to change the ownership of a page to another user. To do so, simply click on **Choose User/Group** and select the user or group who you wish to grant ownership to.

ii. **Last Modified**

The **Last Modified** section displays when the page was last edited.

iii. **Follow-up Tasks**

Page Owners can keep track of their pages by simply scheduling reminders for specific pages. By clicking on the **Review** option in the dropdown menu and selecting a date from the embedded calendar, page owners can ensure that their pages are never out of date. On the scheduled date the system triggers an email to the page owner, reminding the owner of their scheduled task.

Similarly, by clicking on **Archive** in the dropdown menu page owners can schedule specific pages to be archived on the site on a specific date.

Note: **Archived Pages** are pages that are saved for future use on the site. **Archived Pages** on SharpSchool's system can be retrieved and made live at any time.

The **Move** option allows Page Owners to move the page to a new location. You can select to move the current page and all the sub-pages or just the sub-pages. For the move date you can specify a date using the calendar to select or schedule the move for when the page is a certain number of days old.

iv. **Approval Notes**

Administrators at your organization may choose to apply approval workflows to the page you are editing. In such a scenario, changes made by the content author, or page owner, are not made live on the site unless it is approved by a designated individual or individuals. Under the **Approval Notes** section, you, the page owner, can include notes on the changes made which will then be routed to the approver.

v. **Publishing Your Page**

After editing your page using the WYSIWYG editor, you will have three options available to you: **Save Draft**, **Publish** and **Cancel**.

PUBLISHING YOUR PAGE	
Save	Clicking the **Save Draft** button saves all the changes made to your webpage on SharpSchool's system but the changes will not yet appear (or be made live) to visitors of the page. This allows you to keep working on the page over multiple sessions and reveal the changes only when you are ready.
Publish	Clicking on **Publish** will make your changes live immediately.
Cancel	Clicking on **Cancel** will discard all the changes.

2) Check-in Page

Pages are automatically checked in when you **Publish** your page or **Cancel**. Pages that are checked out will be locked to other authors of the page. Only administrators have the ability to override a page lock and check-in a page that is currently checked-out by another user.

A page does not get checked in if you do not click **Publish** or **Cancel**, or if you navigate to a different page while still in the editor.

3) Check-out & Edit Page

Pages that have been checked-in will be made available to other users through the **Check-out & Edit Page** option. When you see this option, simply click on it to access the WYSIWYG editor.

Note: If you have not checked out the page already, you will see **Check-Out & Edit Page** as the menu option. If you have already checked out the page, you will see **Edit Page** as the menu option.

4) Release Schedule

Specifically designed to ease the workload for users who are responsible for maintaining multiple pages, the **Release Schedule** allows you to schedule the live date of created subpages on the system. This feature ensures that you do not have to create and complete pages in a hurry, instead you can plan ahead and release pages only when you are ready to make them live. For instance, teachers have the ability to create their teacher pages during the summer break and schedule them to go live on the website at the beginning of the semester.

When using the **Release Schedule** it is important to remember that it is available in the *Gray Tool Bar* and therefore, the subpages listed within it are specific to the page you are currently viewing. Once you have decided which subpages you wish to release, simply click on **Release Schedule** under **Page Properties** and select the **Release On** and **Release Until** time and date from the dropdowns provided.

Note: If you do not wish to apply a schedule to your pages, simply leave the fields in the **Release Schedule** blank.

Note: For pages that are scheduled to be released on a certain date and time, but are meant to remain on the website indefinitely, simply define the **Release On** fields in the **Release Schedule** and leave the **Release Until** fields blank.

5) Page Permissions

Assigning the correct page permissions is often one of the most critical steps in ensuring consistency and accountability of content on websites. Using the **Page Permissions** console administrators have the ability to assign and remove permissions for groups and users, while individual users have the ability to see who else has access to their pages.

The **Page Permissions** component is broken into two main categories: **Direct Permissions** and **Actual Permissions**.
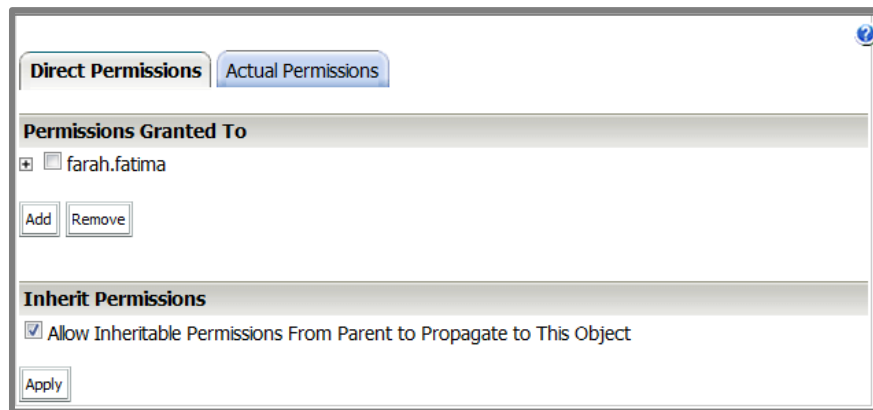

a. Understanding Direct Permissions

The **Direct Permissions** tab lists the groups and/or users who have been assigned permissions to the page you are currently viewing. Here, you have the ability to **Add** and **Remove** permissions, and also inherit permissions from parent pages as well.
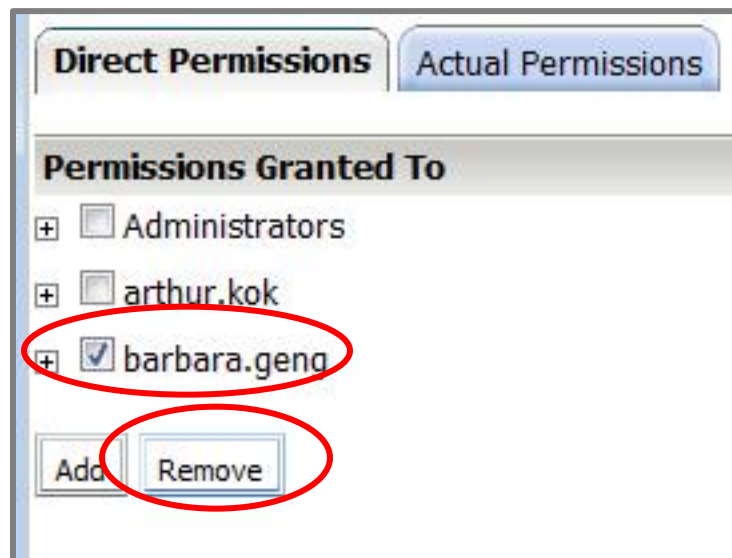
i. Add Permissions

In order to grant permissions to a group or individual user on a specific page, simply click on the **Add** button under the group/user list.

- In the following window click on the groups and users and click **Add.**
- Click **OK** to include permissions.
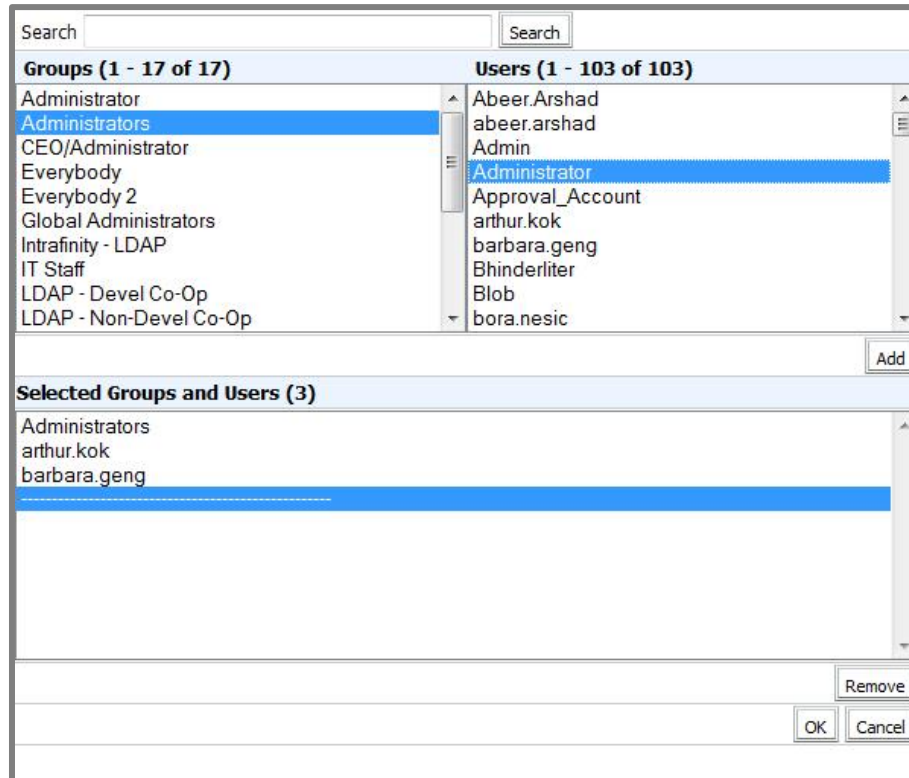
ii. **Remove Permissions**

To remove permissions from a group or user simply click on the checkbox next to the name and click on **Remove**.

iii. **Define Permissions**

When users are added into the permissions box, they are given **Read** permission by default. The definition of the permissions is included below:

PERMISSIONS	WHAT IT DOES
Create	Allows the user to create or add pages.
Delete	Allows users to delete pages.
Read	Allows users to simply view pages but not make any content changes to it.
Write	Allows users to edit content on the page.
Full Control	Allows the users to control all aspects of the page: **Create**, **Delete**, **Read** and **Write**, as well as the ability to assign permissions to others.

To configure a group or user's permissions click on the **+** icon next to the user or group's name. Check the appropriate permission boxes and click on **Apply** in the list to enable the permission.
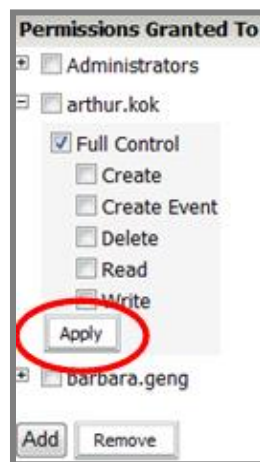
b. Understanding Inheritable Permissions

Inherit Permissions

☑ Allow Inheritable Permissions From Parent to Propagate to This Object

Apply
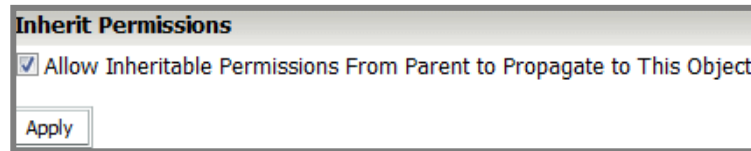
By checking the **Allow Inheritable Permissions From Parent to Propagate to This Object** box under the **Page Permissions** window individuals with access to the parent page will also have access to the page you are viewing. This will now be considered an **Actual Permission** of the child pages.

c. Understanding Actual Permissions

The **Actual Permissions** tab lists the individuals and groups who have inherited access to the page you are viewing. These are often administrators or users assigned to monitor all the child pages under a parent page.

6) Manage Approval Process

Although the responsibility of maintaining pages may be distributed among different groups of users in an organization, pages of critical importance are often sent to an approver before being published on the website. Using the system's **Manage Approval Process**, changes made by a page owner are routed to a designated approver via email.
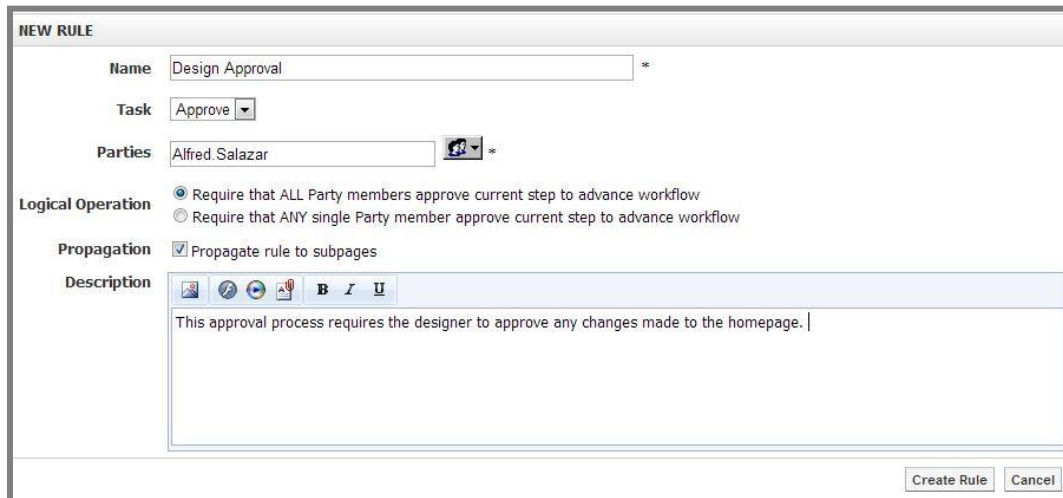
RULES						✚ADD RULE ⊗DELETE ALL RULES ON CURRENT PAGE	
The following is a list of the rules that must be completed on this item.							
Rule Name	Parties	Task	Logical Operation	Propagate To Children	Propagated From	Last Modified Time	Actions
Test	Bert.Tate	Approve	All	Yes		2013-01-24 09:57	⊗
							Close

You must perform the following steps in order to initiate an approval:

a) Click on **Add Rule**

b) In the following window **Name** the rule and define the **Parties** (i.e. the approvers) who will be approving the page.

c) Select the approving **Parties** by clicking on the **Choose User/Group** 🔲▾ button.

d) Select the **Logical Operation** that will apply to your Rule.

Require that ALL Party members approve current step to advance workflow indicates that all Parties that you enter in the step above must approve the change(s) made to the page.

Require that ANY single Party member approve current step to advance workflow allows any one that you add in the Parties to approve any change(s) made to the page.

e) Propagate rule to sub-pages: Allows you to apply the Rule on your sub-pages

Note: By default this option is enabled. This option does **not** apply to the home page.

f) You have the option to include a **Description** of the approval workflow.

g) Click on **Create Rule**.

a. Excluding Pages

The Manage Approval Rules allows you to exclude particular child pages from being included in a rule.

Adding a Page to be excluded:

1) Click on the name of the rule from the Rules page.
2) Click on the **Add Page** button.
3) From the list click on **Select** beside the name of the page.

If you want to delete a page from the **Excluded Pages** list simply click on the button beside the name of the page.

b. Multiple Approval Processes

You have the ability to create multiple approval rules on a page. This step allows changes to critical pages to be filtered through more than one user or group of users before being published on the website.

    i. To add multiple approval processes simply create rules by clicking **Add Rule**

    ii. Use the arrow keys to move the order of rules.

    iii. To delete approval processes simply click on the delete icon

c. Propagating Page Approvals to Subpages

Administrators have the ability to take a single rule and push it to all **subpages** underneath a page. To do so, simply check off the **Propagate rule to subpages** option. This will allow you to set up approval rules to cover a whole section.

d. How to Approve or Reject Pages

There are several ways in which an approver can approve or reject pages.

i.   When a page owner attempts to publish a page that already has a page approval rule applied to it, it will trigger an email to be sent to the approver(s). This email contains a link to the page that requires approval and here the approver can click on the link and approve the page online.

ii.   Approvers also have the ability to view all their outstanding approvals throughout the system. We will cover this feature in detail under the Tasks section of this user guide.

Tip: It is not mandatory to add approvals on all pages; however, it is good practice to apply an approval on the homepage since it is the public facing aspect of your organization.

7) Version History

Let's assume that you've used SharpSchool's tools for a year and throughout this year your webpage has grown and evolved to contain volumes of information. In traditional webpage solutions, it would be impossible to track the growth of sites over time. That's why SitePublish's **Version History** tool was developed to give you the ability to monitor the growth of your website.

Whenever you make changes to a page on SitePublish or to a content portlet, the system automatically saves the previous version of your webpage and creates a new version for the updated page. The benefit of this tool is that it allows users to revert back to an older version of their page at a future date. The **Version History** component features various pieces key of information:

a) **Version:** By clicking on the radio buttons corresponding to different versions, you can compare them in the preview window below.

b) **Ownership:** Under the **Owner** column you can see who made changes to the page.

c) **Created On:** This column informs you of the date and time the page was edited.

d) **Actions:** This tool allows you to preview an older version of your page by clicking on the **Preview** button or make it live by clicking on **Make Live**.

Note: Previewed objects are shown in the lower half of the *Version History* window.
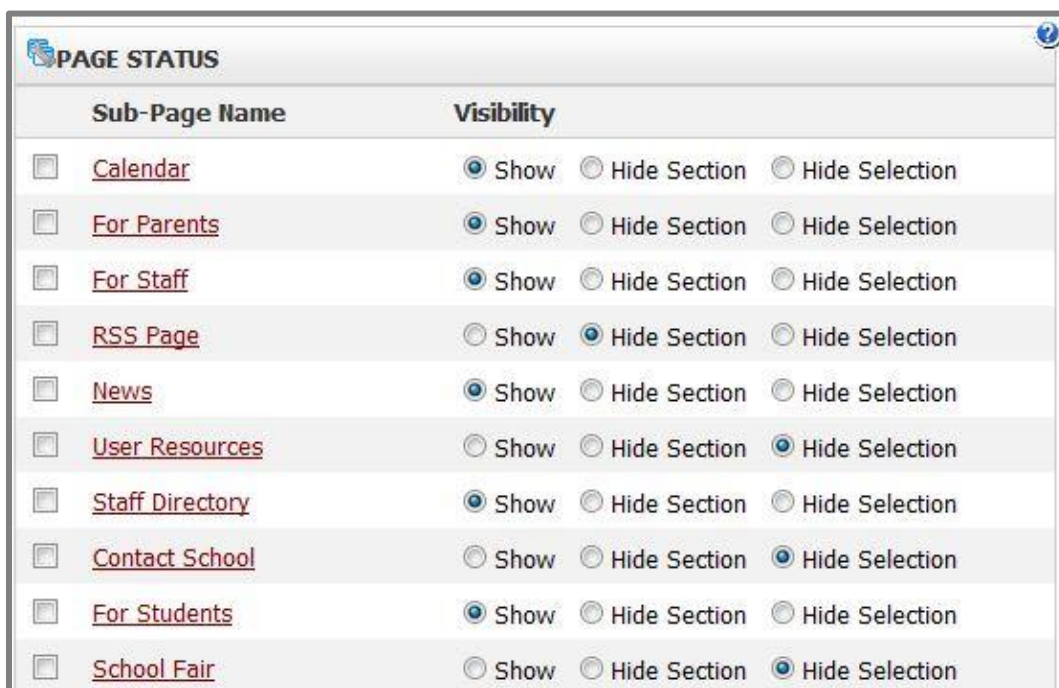
e) **Delete:** you also have the ability to delete older versions by clicking on the delete icon
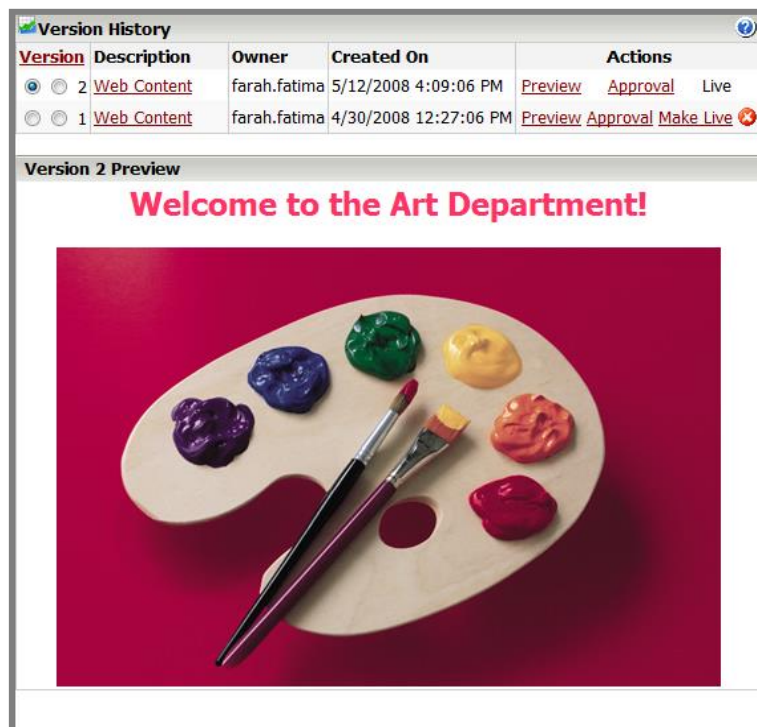
8) Manage Sub-pages

Manage Sub-pages is one of the most important tools in the *SitePublish* system. Through this one tab, you have the ability to perform three functions:

a) Change the **Visibility** of pages – Found under **Page Status**

b) **Archive** pages – Found under **Page Status**

c) Change the order of pages – Found under **Page Order**

a. **Visibility**

After creating pages you have the ability to **Hide Section**, **Hide Selection** or **Show** them on your site. Hidden pages are different than archived pages*;* users who have a direct URL will still be able to access a hidden page as it is still live on your website. As mentioned earlier, archived pages are essentially saved pages that you can make live at any time.

Hiding and showing pages is easy: simply click on the **Show**, **Hide Section** or **Hide Selection** option next to the title of the page. The key point, however, is to understand how the *Visibility* of a page can be used to enhance the impact of your website.
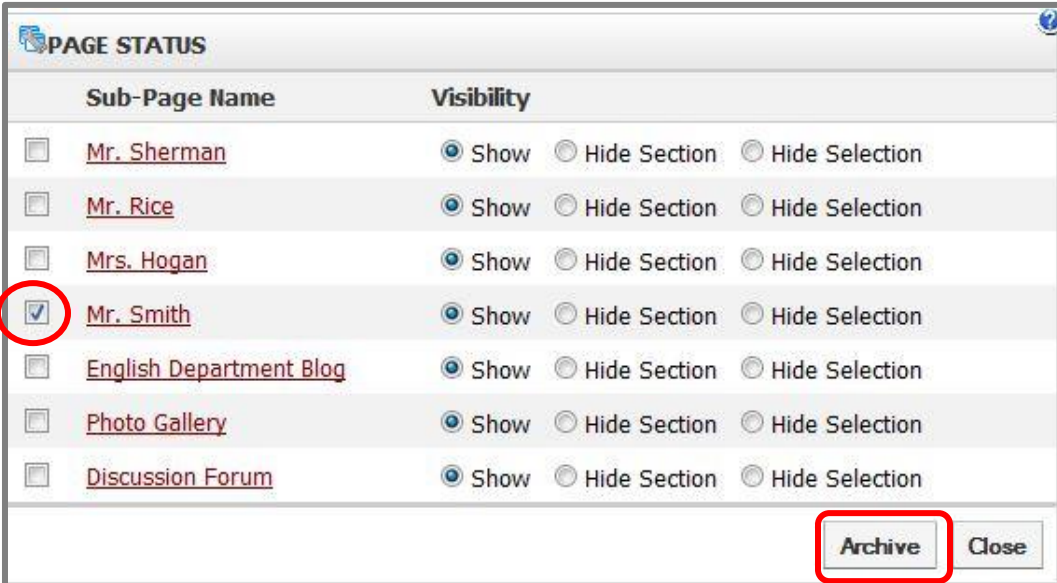
Often content authors make the mistake of adding too many subpages to their website. These pages negatively impact the readability of the site since users are confronted with an unwieldy menu. To avoid this common pitfall, content authors can create hidden subpages and simply hyperlink them on another area of the website.

Hide Section allows you to hide your sub-pages, as well as hide the page from top menu bar and the side menu bar. If there is a calendar within your hidden section, it will not be visible from other calendars on your site. You will not be able to see any sub-pages of the page from the side menu bar.

Hide Selection allows you to remove a page from the top menu bar and sidebar menu, without hiding the items that are contained within. The calendars under the hidden page will be visible to other calendars and the side menu bar will display any subpages of the current page.

b. **Archived Pages**

Archived pages are those pages that are saved and cannot be accessed by anyone except page owners and administrators.

To archive a sub-page select the checkbox next to the sub-page name and click **Archive**.

c. **Page Order**

When you first create a new page, it will automatically be added to the bottom of the list of sub-pages for the page you are on. This is the case both for the horizontal menu across the top and the vertical sidebar menu.

To change the order that sub-pages appear, both in the horizontal and vertical menus, go to **Page Properties** -> **Manage Sub-Pages** -> **Page Order**. Click and drag the pages to rearrange the pages to your liking.

PAGE ORDER	
Page Name	Created On
Arts	11/11/2011 11:49:06 AM
English	11/11/2011 11:47:40 AM
History	11/11/2011 11:48:35 AM
Technology	5/25/2012 6:21:17 AM
Math	11/11/2011 11:48:00 AM
Science	11/11/2011 11:48:16 AM
Technology	5/25/2012 6:21:17 AM

Update Page Order   Cancel

When you have finished, click **Update Page Order** to save your changes.

9) Archived Sub-pages

The **Archived Sub-pages** link under **Page Properties** tabulates the pages that were archived through the **Manage Sub-Pages** link. Here you have the ability to delete pages as well as un-archive them.

Delete Pages: to delete pages from the system, simply click on the ⊗ icon corresponding to the page title.

Un-Archive Pages: if you wish to retrieve a page, that is, if you wish to make it live on your website again, simply click on the checkbox corresponding to the page title and click on **Un-Archive**.
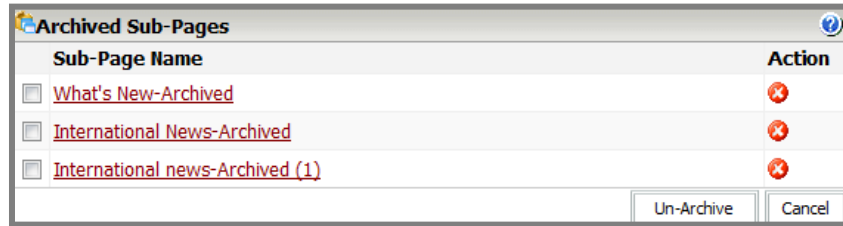
Note: In the *SitePublish* system, pages must be archived before they can be deleted. This two-step process ensures that pages are not deleted mistakenly. **Deleted pages are lost permanently and may not be retrievable**; therefore it is safe practice to archive a page first. **Do not delete a page unless you are fully confident you will not need the page, or any the data contained on the page (or its sub-pages), again in the future.**

10) Metadata

Metadata holds specific attributes of a webpage. Search engine specific metadata is a collection of information about your webpage that is only visible to search engines. Thus, you will increase you search rating by including keywords in your **Search Description** and **Search Rating** fields. This information is applied to the search feature on your website.

Note: This component of the *SitePublish* tool is applicable to web experts; regular users will not be required to use this tool.

11) View Sub-pages

This menu lists all the sub-pages, including hidden and not yet released pages, currently under the parent page. This menu allows content authors to easily access and edit hidden or unreleased pages.
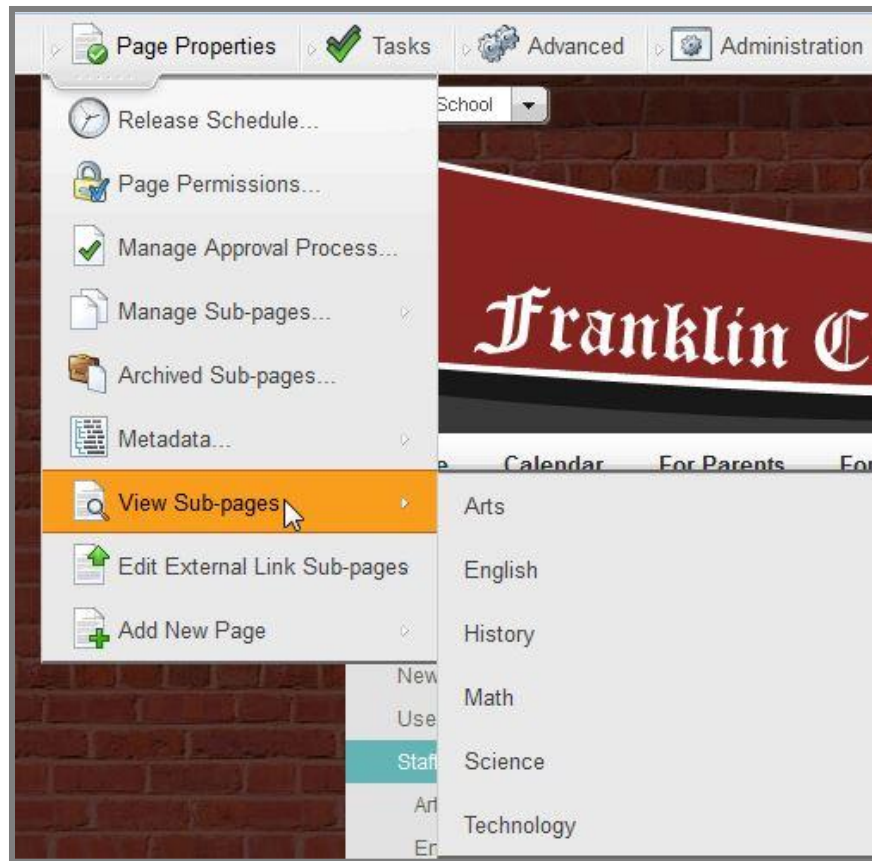
12) Add New Page

The **Add New Page** menu is perhaps one of the most important features in the SharpSchool solution. This menu allows you to create a page based around many of the modules that are available within the system.

These pages and their associated modules are known as a **Page Type**. We briefly discussed the concept of a page type earlier in this manual under the *Vital Information* section.

Definition: Page Types

The different page types are:

Title	Description
Blog Page	A **Blog Page** allows users to add blogs to their website. This can be used by teachers to enhance the overall effect of their teacher pages, or it can be used by the school administration to keep parents updated on the current events around the district.
Calendar Page	The **Calendar Page** adds SharpSchool's calendar under a parent page.
Content Space Page	A **Content Space Page** is a blank webpage. This page type can be likened to a blank document in Microsoft Word®
Discussion Forum Page	This page type allows users to add a discussion forum to their websites. This can be used by administrators to encourage communication between students, parents and teachers, or even create private discussion forums that are solely catered to teacher communication.
Document Container Page	*A Document Container* is an online repository of files and folders that are available for external users to download.
External Link Page	An **External Link Page** is a page that routes users to an external website, another area of your own website or a document. Clicking on an **External Link Page** will open that link in another window.
Form Page	A **Form Page** contains customized forms for your site. Information from these forms is routed to specific individuals and the submissions are saved in specific folders on the SharpSchool server.
News Content Page	A **News Content Page** offers users an intuitive

	form to create and publish online news items. The **News Content page**, along with the **News Section page**, form SharpSchool's **News Engine** tool.
News Section Page	The **News Section Page** is the precursor to a **News Content Page,** and can be likened to the physical front page of a newspaper that contains news summaries. Users have the ability to publish multiple **News Content Pages** under a single **News Section Page**, which then renders the **News Content Page** summaries.
Photo Gallery	A **Photo Gallery Page** allows users to upload and publish pictures in a dynamic photo gallery.
Teacher Page	The **Teacher Page** is specifically designed for teachers and educators and features a variety of page types as part of the teacher page package.
Wiki Page	The **Wiki Page** allows users to create, manage and edit a wiki. This can be used by teachers to cover their class, a specific project, etc.

Note: Depending on the package your district/school purchased from SharpSchool, some of these page types may not apply to you.

The listed page types will be explained in great detail in following chapters of the SharpSchool manual. However, for the purpose of this chapter we will learn about the **Content Space Page**.

Adding a New Webpage

Content Space Pages are the most commonly used page type in the solution. As mentioned earlier, this page type is a blank webpage where users have the ability to add text, tables, pictures, videos, hyperlinks and more.
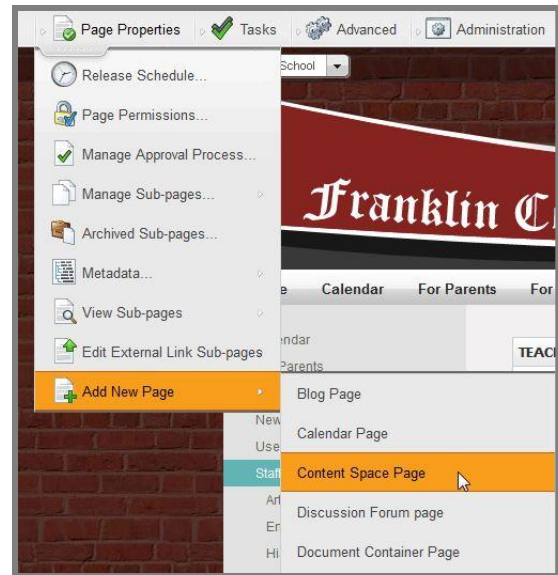
To add a new **Content Space Page** you will need to go through the following steps:

a) Select the parent page under which you wish you add a new **Content Space Page**.

b) Go to **Page Properties**.

c) Scroll down to **Add New Page**.

d) Click on **Content Space Page**. A new window will load.

e) Title your new page. This title will be published on the website as a subpage.

f) Click **Create Page**.

g) You will then be routed to the WYSIWYG editor. For more information on how to save or publish your page, refer to *Section I.1 Edit Page* of this manual.

II.   Tasks

The Tasks menu comes second in the row of menus in the *Gray Tool Bar.* This menu is considered the housekeeping component of the solution and offers useful reminders and information on maintaining your pages.

1) Check Accessibility

It is possible that your website will be modified several times. When this happens, certain pages or functions may not be accessible to reading aids for the blind or hearing impaired.

This section allows you to verify that accessibility is available to all. This will produce a list of all the content on the page that is inaccessible to the disabled. The standard used is that of "section 508" for equivalent access to electronic media by all.

2) Check Links

Often, page owners on websites have no easy way of verifying when a hyperlink link is broken. The **Check Links** option allows users on the SharpSchool system to check whether links on the site are working properly. This tool produces a table of all the links on a page and the corresponding status of each link (i.e. whether or not it is valid). Clicking on a link will take you to its target destination.
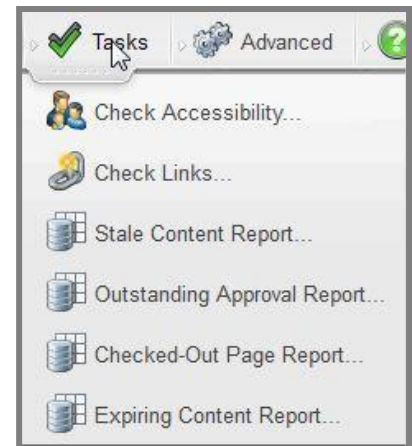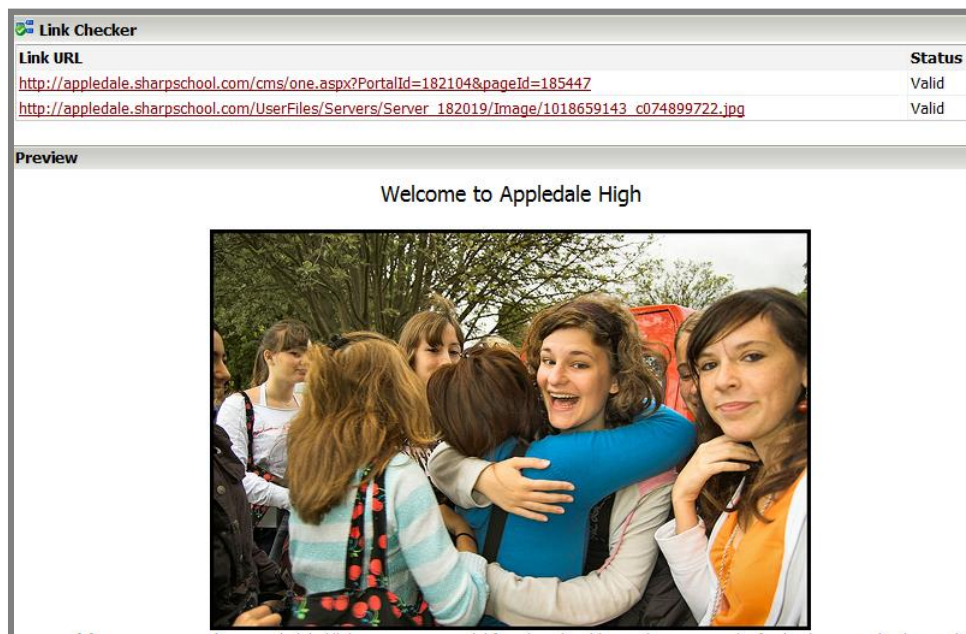
3) Stale Content Report

The **Stale Content Report** ties into the **Follow-up Tasks** feature we covered under the **Page Properties** section. If you recall, this is where users have the ability to set up scheduled reminders on their pages. **This report is only available to administrators.**

Reminder: Scheduled tasks are sent as reminders to the page owner via email.

In addition to sending an email reminder, the system also tabulates all pages that missed their review date under the **Stale Content Report**. This ensures that even if page owners are unable to update their pages on a specific date, administrators can still easily track which pages have been updated or reviewed and which have not.

a. Using the Stale Content Report

This report contains a table with key information about pages on your system:

i. **Page Name:** This column lists the name of the specific page that missed its review date. These titles are clickable; therefore page owners can directly access the page and make content changes to it.

ii. **Page Owner:** This column shows the page owner who missed the review date. For administrators, this column will show the review status of all the page owners on the system.

iii. **Follow-up Task:** This column defines the task that was assigned to the specific page.

iv. **Follow-up Date:** This column displays the date the follow-up task was scheduled to be completed.

v. **Publish Status:** This column displays the current publish status for the page.

b. Export Information

Users have the ability to export the **Stale Content Reports** for their site. This tool is often used by administrators to keep track of how often pages on a site are updated.

To export information, click on the dropdown to select the format of the exported document (Excel or PDF) and click on **Export**. This will open the exported document in the format you selected.

| Page Name	Page Owner	Follow-up Task	Follow-up Date	Publis Status
Mr. Smith	charlie.danner	review	09/28/2012	Live

4) Outstanding Approval Report

In the *Manage Approval Process* section earlier in this chapter, we learned how to apply approval workflows to pages on your site. The premise of approval workflows is to route changes made by a content author to designated individual(s) or groups who will then be responsible to approve or reject those changes.

Notifications of pages pending approval are sent to the approver via email. However, the **Outstanding Approval Report** serves as an extension to the emails and offers the approver a list of all the pages in one comprehensive location. Approvers have the ability to click on the title of the page directly from the report and approve or reject the changes. **This report is only available to administrators.**

Export the Approval Report

Users have the ability to export the approval reports for their site. This tool is often used by administrators to keep track of how often pages are pending approval

To export information simple click on the dropdown menu and select the format of the exported document (Excel or PDF) and click on **Export**. This will open the exported document in the format you selected.
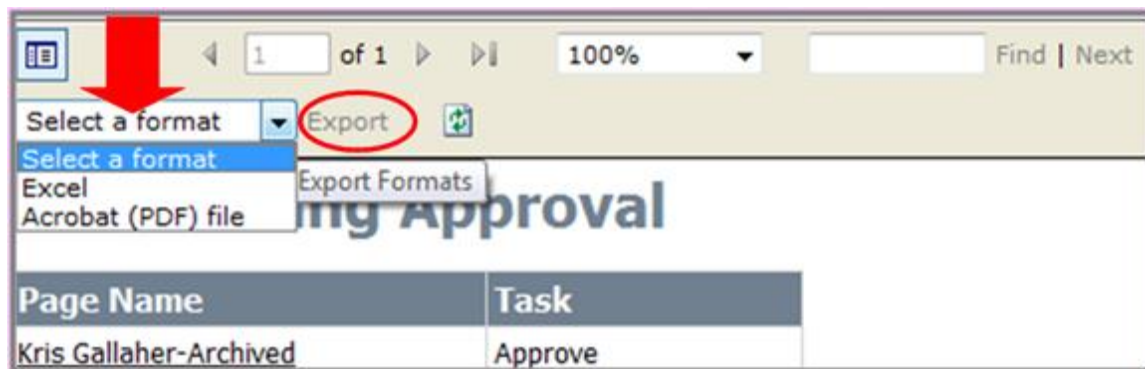
5) Checked-Out Page Report

The Checked-Out Page report provides a list of pages that have been checked out and have not been checked in. You can search for pages Checked-out longer than a certain number of days, search for pages checked-out by a specific user, or you can search for all checked-out pages on the site. Once you have set your specifications, to see the report, click **View Report**. You can export the report by selecting Select a format from the drop down menu and then click **Export**. To view the page that is checked out, simply click on the **Page Name**. You will also see who the page is **Checked Out By** and the date and time the page has been **Checked Out Since**. **This report is only available to administrators.**

6) Expiring Content Report

The **Expiring Content** report provides a list of pages that are expiring. That is, pages that are or were visible and that have set to be hidden after a certain date (via the release schedule). You can search by pages **Expiring in** certain number of days, **Page Owner**, and to see the entire report click **View Report**. You can export the report by selecting Select a format from the drop down menu and then click **Export**. To view the page that is expiring, simply click on the **Page Name**. You will also see who the **Page Owner** is and the **Expiry Date**.

III.   Advanced

The **Advanced** menu is the third row of menus found on the *Gray Tool Bar*. This menu features the more complex tools of the system. Although intuitive enough to learn on your own, it is recommended that users first become familiar with the **Page Properties** menu before delving in to the **Advanced** menu options.

The options that are available in the **Advanced** menu vary according to your permissions on a site. Therefore, several features mentioned in this section will refer to the *Administrator Manual* and will not be detailed in this user guide.

1) Switch to Design Mode

This option reveals the different portlets currently on your page. We briefly discussed portlets under the *Vital Information* section of this user manual. A portlet is a web-part that is used to divide an existing webpage into different content areas. It is important to remember that not all portlets are content, i.e. text portlets. We will describe the different portlet types later in this manual.
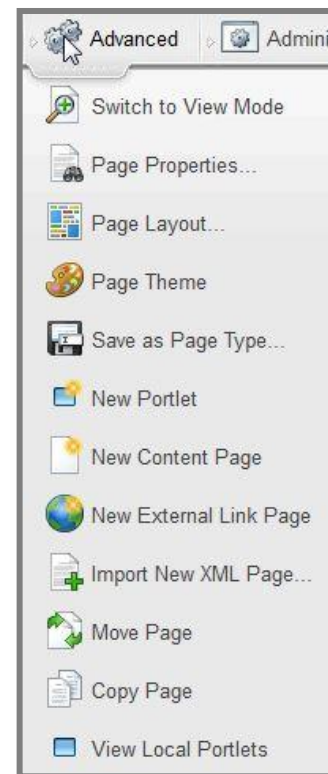
There are several different types of portlets available through the SharpSchool system. We will detail some of the most commonly used portlets in this manual as many portlets apply mainly to technical IT personnel at organizations.
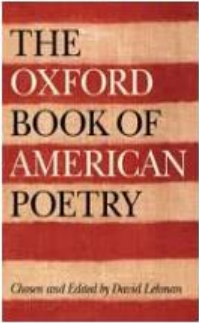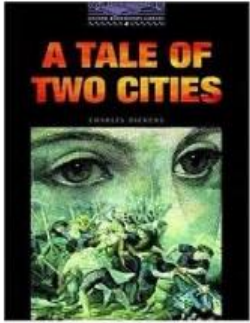
To edit portlets on an existing page:

    a) Go to **Advanced**.

    b) Click on **Switch to Design Mode**.

A comparison of both pages has been listed on the following page. **Image A** is of a regular page where users cannot differentiate the various portlets. **Image B** is a view of the same page after a user switches into design mode. The exact appearance of design mode will vary depending on whether the drag and drop portlet feature has been enabled for your account. For more information on drag-and-drop portlets, please see the *Drag-and-Drop Portlets* sub-section.

Image A: View Mode

Image B: Design Mode

In **Image B,** once you click on **Switch to Design Mode** all the portlets on the page are revealed. On the upper right corner of each portlet you are given a number of options:

a) **Edit:** By clicking on the **Edit** button of a content portlet, you have the ability to make any changes you could normally make by checking out and editing a page. We will go into detail about the different types of portlets later in this manual.

b) **History:** By clicking **History** button of a content portlet, you can change the version. This option is only available for content portlets.

c) **Minimize:** Clicking the ▬ button will minimize the portlet and hide it from view.

d) **Delete:** Clicking the ✖ button will delete the portlet from your page. Note that this is a permanent and irreversible decision. As such, when you attempt to delete a portlet, you will be presented with a message informing you that once a portlet has been deleted it cannot be easily recovered. You must confirm acceptance of this statement prior to deleting the portlet.
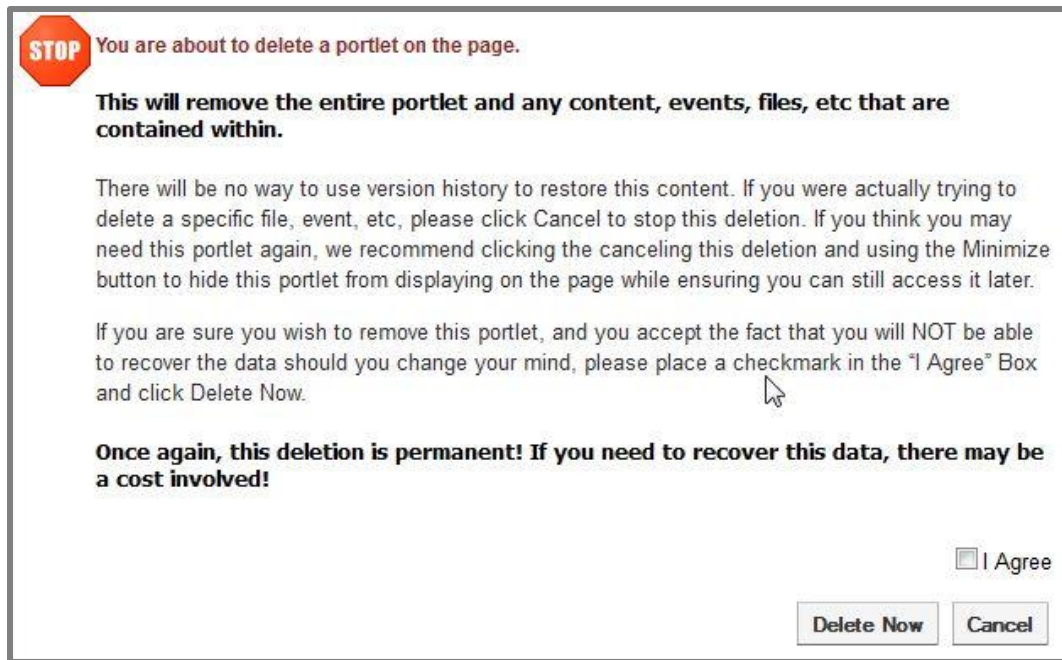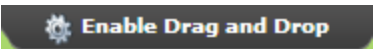
Note: The tools covered in the **Advanced** menu, such as **Switch to Design Mode** and **View Local Portlets** can be used to edit content on the home page of your site.

Drag-and-Drop Portlets

On many sites an option to use drag-and-drop portlets will be available. This functionality allows you access to all the functionality outlined within the *Switch to Design Mode* section, but it allows you to add and re-arrange portlets by simply clicking and dragging the portlets on to and around the page.

If your site allows the use of drag-and-drop portlets, then when you switch to design mode on a page, in the top right corner of that page you will see a drag and drop button. Clicking **Enable Drag and Drop** will enable drag and drop for your account on the site. This is a per-user setting so clicking the button will enable drag and drop for your account only. Depending on your server environment it may take a few minutes for the change to complete. During this time, you may seem to switch back and forth between the two modes whenever you load a new page.

Now when you switch to design mode you will be presented with a new toolbar. This toolbar will allow you to access both the **Portlet Library** and the **Local Portlets** by clicking between the two tabs. You can then choose the Portlet Category by choosing it along the top. Then click and drag the type of portlet you want to use in to the desired region on the page below. The page will refresh and your new portlet will be in place.
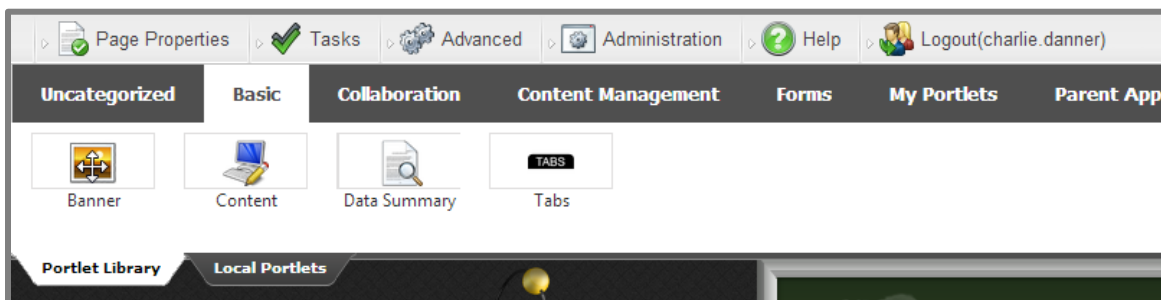
Note: While you can drag and drop portlets in to any region on your site, you cannot drag and drop portlets on to pageset (the area of the page where you generally see the horizontal navigation). For pagesets, which can only be modified by Administrators, you will still use the **Add Portlet to Pageset** link and add portlets that way.

Editing, minimizing and deleting portlets works the same as when you aren't using drag and drop. The only difference is that in order to see those buttons you will first need to move your cursor over the portlet in question.

To move portlets within regions or between regions, simply hover your mouse over the top left corner of the portlet, where the name is located. Your cursor will change to ⊕ when you are in the correct spot. Then click and drag the portlet from its current location to wherever you would like to place it.

If you decide you wish to stop using the drag and drop portlets functionality, you can do so at any time by clicking this icon ▮ while you are in design mode. Depending on your server environment it may take a few minutes for the change to complete. During this time, you may seem to switch back and forth between the two modes whenever you load a new page.

Note: If your site does not have the drag and drop functionality, please contact our support team and we will be happy to enable it for your site.

2) Page Properties

The **Page Properties** section under the **Advanced** menu contains key information about the page you are viewing. This section is divided into two main headings: **Page Properties** and **Page Administration.**

a. **Page Properties**

   This section is divided into six main headings:

i.   **Title:** You can change the title of your web page by simply typing the new title here.

ii.   **Name:** This appears at the end of the URL for the page you are on. For example, if you were on Mr. Smith's teacher page, the URL would end in mr_smith. So your URL could be http://demo.sharpschool.com/staff_directory/mr_smith. This name will be in a format that is compatible with URLs as such special characters and spaces will be converted to underscores.

iii. **Page Type:** Displays the page type of the current page.

iv.   **Summary:** A description of the website.

v.   **Page Theme:** This determines the appearance of the page. It is recommended not to change this setting as it is controlled and maintained by the administrators at your

organization. The notable exception would be if teacher page themes have been enabled for your site and you wish to pick a teacher page theme. If you ever wish to revert back from a teacher page theme to theme used by the parent page of your page (in most cases, this will be the site theme) then you can change the theme to Inherit. More information on using teacher page themes will be provided when we talk about the *Page Theme* option.

b. Page Administration

This component is similar to the *Page Administration* section we covered in Section 1 (*Page Properties*) unit 1 (*Edit Page*) of this manual.

The **Page Administration** section contains user specific information on the page. This section is divided into 3 main headings:

i. **Page Owner:** The **Page Owner** field lists who is the owner of the page. That user has full control over the page. Here users and administrators also have the ability to change the ownership of a page to another user.

   To do so, simply click on **Choose User/Group** , remove the current owner, select the user or group you wish to grant ownership to.

ii. **Last Modified:** The **Last Modified** section informs a page owner on when that page was last edited.

iii. **Follow-up Tasks:** Page owners can keep track of their pages by simply scheduling reminders for specific pages. By clicking on the **Review** option in the dropdown menu and selecting a date from the embedded calendar, page owners can ensure that their pages are never out of date. On the scheduled date the system triggers an email to the page owner, reminding him/her of the due task.

   You may also choose to **Move** the page to another location. Once you select the **Move** task click **Browse** to select a **Target Location**. This target location will be the new parent page of the page you are moving. You can also choose to move the current page and all its sub-pages or move just the sub-pages of the current page (this option can be useful if you would like to move all your news stories from recent news to an older news area at the end of the school year). You also have the option

make the move happen on a specific date or when the page is a specific number of days old.

Similarly, by clicking on **Archive** in the dropdown menu page owners can schedule specific pages to be archived on the site.

3) Page Layout

By default, the layout of a **Content Space Page** is single large area for you to enter text via a content portlet. If you to have other elements on the page such as a mini-calendar, or a news area, you may want to consider changing the page layout to one that allows for multiple regions.

The **Page Layout** option allows you to select from a range of standard layout themes in the system. Simply click on the corresponding radio button to select a particular template. You can also create a custom layout however this requiring coding the layout yourself. For more information on custom layouts, please see our *Themes and Templates* manual.
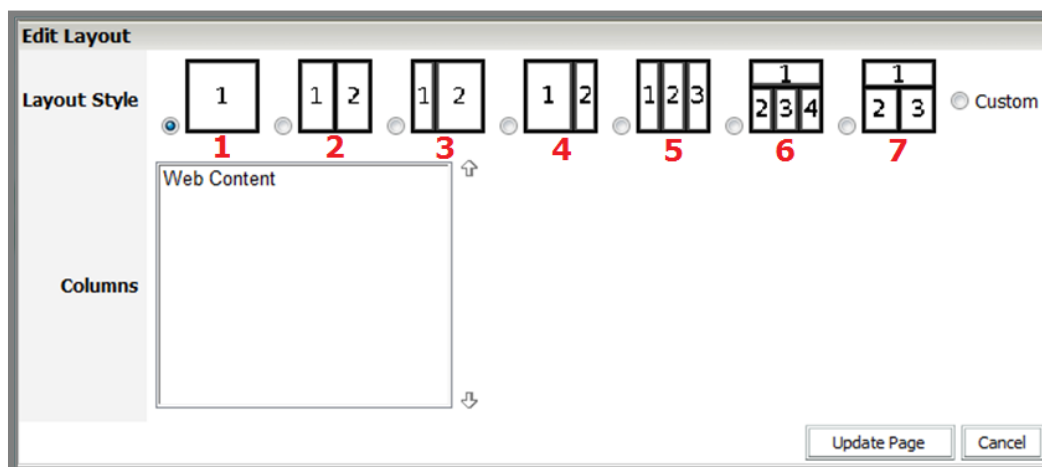
Note: All **Content Space Pages** are set to **Layout Style** 1 by default.

Page Layout: A Scenario

There are many templates that you can select from, therefore we are going to select one template and apply it to a hypothetical scenario. In this scenario we will be introduced to a user, Jane Smith, who wants to use multiple portlets on her page.

Jane has already added a **Content Space Page** under a specific parent page and is ready with an overall vision of her future page. But first, she must go to **Advanced** in the *Gray Tool Bar* and click on **Page Layout** to select the skeleton structure of her page.

At first, Jane's **Page Layout** window looks like this, with a single blank page layout.
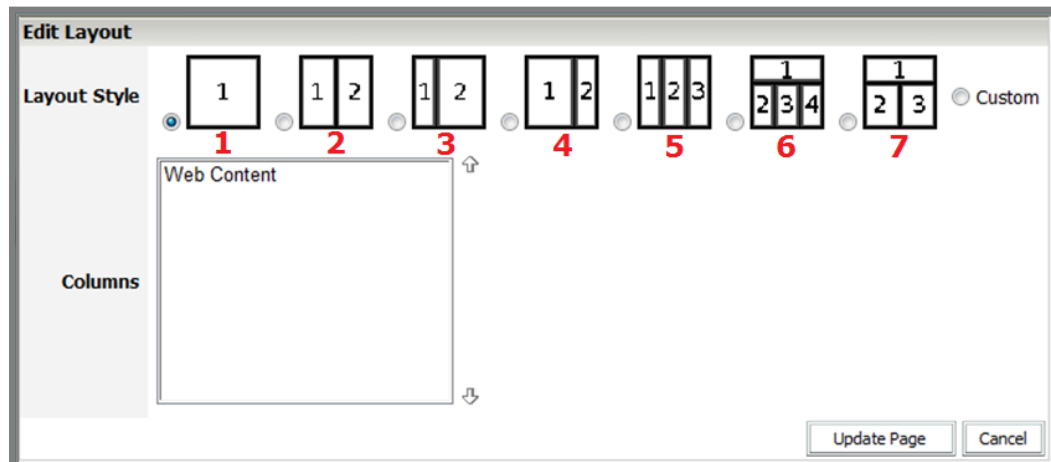
i.   She then selects layout 7 by clicking on the corresponding radio button.
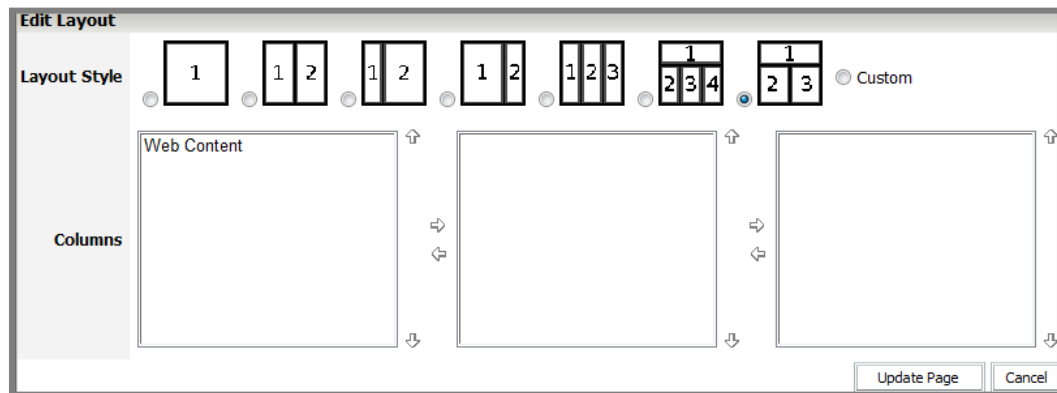
Now there are 2 more boxes included in the columns region of the page layout window. Each number in the layout template corresponds to a region. The image below demonstrates how this is done:
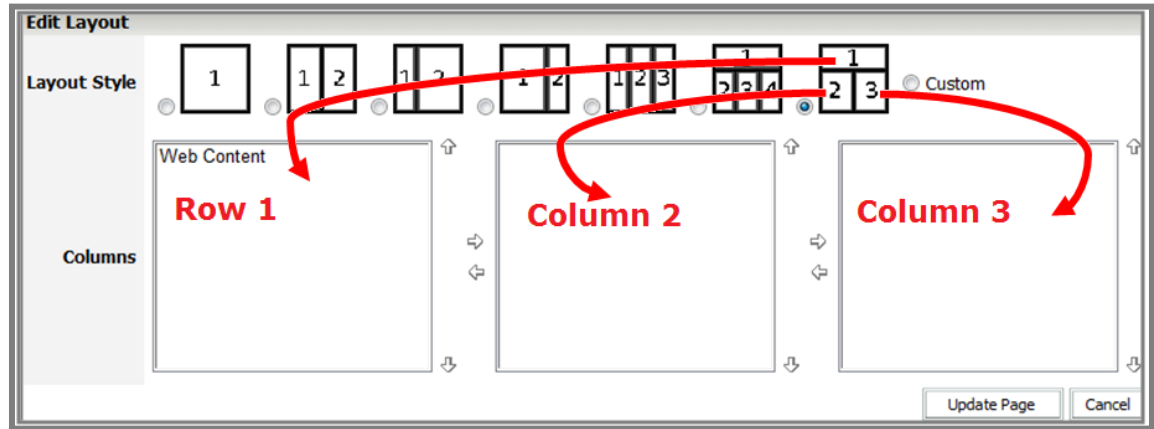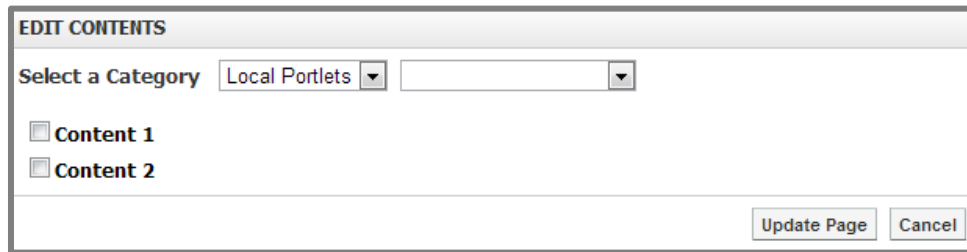
So far Jane has established the skeletal structure of her page, but has yet to add any portlets. Only **Region 1** has a portlet in it because that is the original content area that was available with the **Content Space Page**. This portlet is called Web Content. Jane has to add portlets into **Region 2** and **Region 3** as they are still blank. At this point, she clicks **Update Page** to apply the layout changes to her webpage.

ii.   She is now routed back to her content space page where she **Switches to Design Mode** in order to add more portlets to her page. Her page will look something like this:
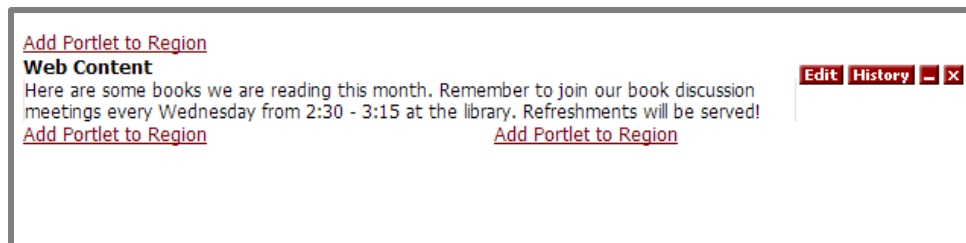
In the view above, the Web Content portlet is part of **Region 1** of the **Page Layout**. However, **Region 2** and **Region 3** are still empty, but now Jane as the ability to add portlets by simply clicking on **Add Portlet to Region.**

iii.   She decides to add a portlet into **Region 2**.

EDIT CONTENTS

Select a Category   Local Portlets ▾   ▾

☐ Content 1
☐ Content 2

Update Page   Cancel

Jane now has the ability to add more content portlets to her page by simply checking a box. In this case she selects **Content 1** and clicks **Update Page**.

iv.   Jane is now brought back to her main page and the new portlet has been added to Region 2. To add content to this area, she clicks on the **Edit** button next to her new portlet. This will route her to the WYSIWYG editor.

After adding the text, Jane clicks **Publish** under the WYSIWYG editor and once again adds another portlet, this time under Region 3. For region 3 she decides to add a upcoming events portlet. She then configures the upcoming events portlet to point to her calendar.

v. Finally, Jane's page has 3 portlets on it and looks like this:
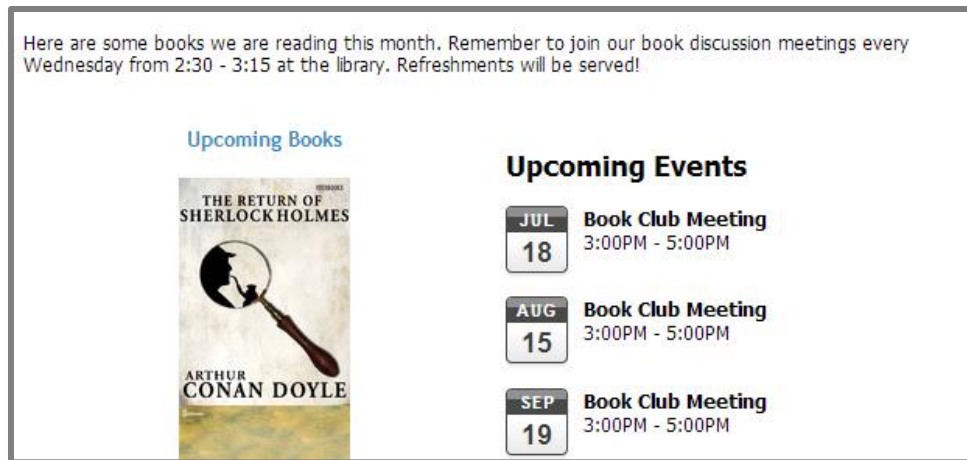
Page Layout: Changing the Order of Portlets

Jane can still alter the layout of portlets on her page, or even change the overall layout of the page by going to the **Page Layout** option under the **Advanced** menu bar. Furthermore, she can change the order of portlets on the page by clicking on the portlet name and using the arrow keys to move them around.

- **Vertical** navigation keys ⇧⇩allow you to change the order of portlets in a region.
- The **horizontal** navigation keys ⇦ ⇨ allow you to move portlets from one region to another.
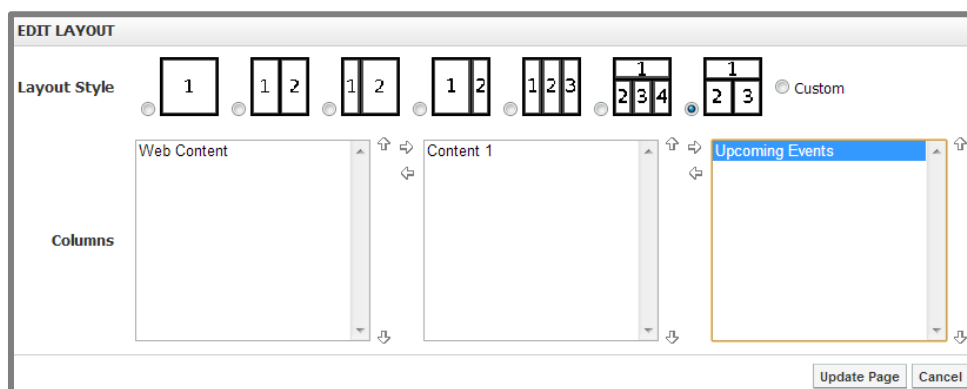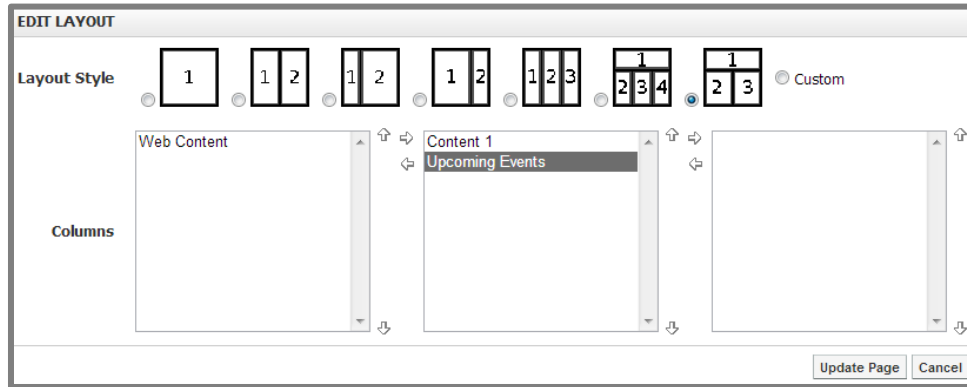
As you can see from the screenshots, Jane moved the Upcoming Events portlet underneath Content 1 within Region 2. Region 3 is once again empty and awaiting portlets to be added.
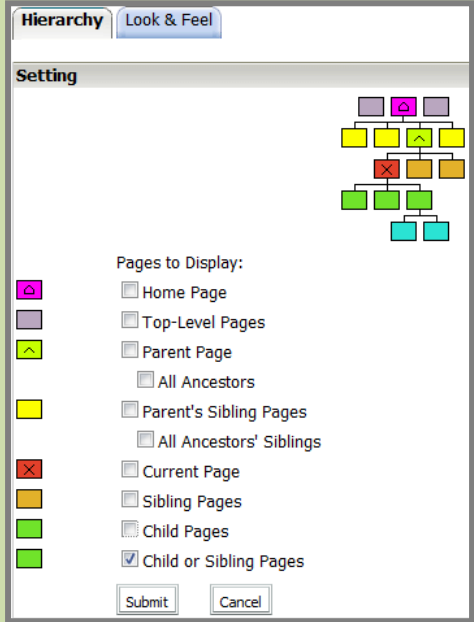
Note: You can also move portlets between regions using the drag and drop functionality. For more information on how that process works, please see the *Drag and Drop Portlets* section.

Page Layout: Portlet Types

Portlet Type	Description
By default when a user wishes to add a portlet to a page, they are given access to a wide range of portlets via the Portlet Library. Most sites also have a large number of Local Portlets they can select as well. The exact portlets available and the categories they are placed under may vary depending on your site; this is particularly true for any portlets found within the Local Portlets area. If you do not see a portlet in the Portlet Library, check the Local Portlets area.	
Basic Category	
Banner	The banner portlet allows you to create a rotating slideshow of images to display on a page. You can determine how big the portlet appears on the page, how frequently it rotates and more.
Content	A text portlet, where users can add content, videos, pictures, hyperlinks etc. Editing this portlet will take you to the

	WYSIWYG editor.
Data Summary	This portlet is used to display news content pages on a page. Once you have added the portlet to a page, you can configure it to choose what news section to point to and what render template to use. For more information on this portlet, please see *Chapter 8: News Engine*.
Tabs	The tabs portlet works like a normal content portlet except you can add tabs. Each tab works as its own content area within the tabs portlet. You can also set the width of your tabs portlet to best suit its placement.
Collaboration Category	
Advanced Data Display	This portlet allows you to create a news story on the page. This is the same portlet that is created when you create a News Content Page. For more information on this portlet, please see the *News Engine* manual.
Advanced Data Summary	Despite the different name, this portlet is identical to the Data Summary portlet. This portlet is used to display summaries of news stories on a page. Once you have added the portlet to a page, you can configure it to choose what news section to point to and what render template to use. This is the same portlet that is created when you create a News Section page. For more information on this portlet, please see the *News Engine* manual.
Calendar	Users have the ability to add a new calendar to a page. Refer to the *Calendar* manual for more information on calendars.
Discussion Forum	Users have the ability to embed a **Discussion Forum** into a page. Refer to the *Discussion Forum* manual for more information.
Document Container	Users have the ability to embed a **Document Container** into a page. Refer to the *Document Container* manual for more information.
Mini Calendar	Users have the ability to embed a **Mini Calendar** into a page. This calendar can linked with any calendar on the site.

Mini Upcoming Events	You can link a **Mini Upcoming Events** portlet to any calendar on the site. This portlet publishes a listing of upcoming events on to the page.
Photo Gallery	Users have the ability to embed a **Photo Gallery** into a page. Refer to the *Photo Gallery* manual for more information.
Wiki	This portlet allows you to create a wiki on a page. Refer to the *Wiki* manual for more information.
Workspace Calendar	Despite the different name, this portlet is identical to the Calendar portlet. Users have the ability to add a new calendar to a page. Refer to the *Calendar* manual for more information on calendars.
Content Management Category	
Advanced Site Navigation	This portlet controls what pages are displayed in the left-hand navigation. You have the ability to define which pages display as well as change the look and feel of the text in the navigation bar. This portlet will be a part of your sidebar pageset on most sites.
Class Directory	This portlet allows you to display a listing of classes within the LMS or My Classes area. You can configure which organizations the classes will be displayed for as well as what information is displayed and how it is sorted.
Presentation	Allows you to display information from the workspaces or knowledge repository on a normal content page.

|	
Recommended Content	This portlet is intended for use specifically with the knowledge repository. It allows you to pick specific items or categories and display them on the page.
RSS Aggregator	Allows you to display an RSS feed on the page. This can be a feed from one of your sites or from an RSS feed found online. Please note that this portlet is not compatible with Atom feeds.
Site Map	This portlet displays a directory of pages from your site. You can show the top 3 or 4 levels of pages and whether or not to include hidden pages in the map.
Site Navigation	Despite the difference in name, this portlet is exactly the same as the Advanced Site Navigation portlet. This portlet controls what pages are displayed in the left-hand navigation. You have the ability to define which pages display as well as change the look and feel of the text in the navigation bar. This portlet will be a part of your sidebar pageset on most sites.
Staff Directory	This portlet allows you to display your staff. Be default, three tabs will be displayed for Administrative Staff, Staff and Teachers. However you can edit the portlet to choose other groups. You can also control what information is displayed.
Web Content	This portlet is exactly the same as a content portlet where you have the ability to add content, videos, pictures, hyperlinks etc. Editing this portlet will take you to the WYSIWYG editor.
Forms Category	
Custom Form	This portlet allows you to insert a form portlet on the page and link it to one of the form templates. For more information on forms, please see the *Forms Engine* manual.
Poll	This portlet allows you to place a question on the page and allow visitors to the page to vote on the answer. The results can be displayed on the page in bar or pie chart form.
Survey	This portlet allows you to create a series of questions for visitors to answer. Can include short answer, multiple choice, essay and

	other question types.
My Portlets Category All portlets in this category are context sensitive and they will only display information based on your user account. This also means that for guest users the portlets will not be visible on the page.	
My Alerts	Allows you to view and manage any alerts you have created for calendars, blogs, discussion forums, etc.
My Cases	This portlet allows you to view any workflow cases that are associated with your account. For more information on workflow, please see the *Workflow* manuals.
My Profile	This portlet allows you to see your user profile. Can be a nice shortcut for users to make changes to their profiles.
My Upcoming EREG Events	This portlet shows any upcoming events you have registered for in Event Registration. For more information on event registration, please see the *Event Registration* manual.

4) Page Theme

The Page Theme option can be a great way to give your page its own look and feel. **Note:** In order to set a page theme for a page, **you must be the page owner or a member of the Administrators group**.

To set a page theme, go to the page you want to set and then click on **Advanced** -> **Page Theme**. You will now be brought to the Design Portfolio.

From here you have the option to browse through all of the themes. On the left side of the page you can help to narrow your search. You can use the search bar to search for a specific theme. You also have the option to view pages for specific categories such as Nature or Holidays or you can view themes that match a specific color by using **Filter By Color**.
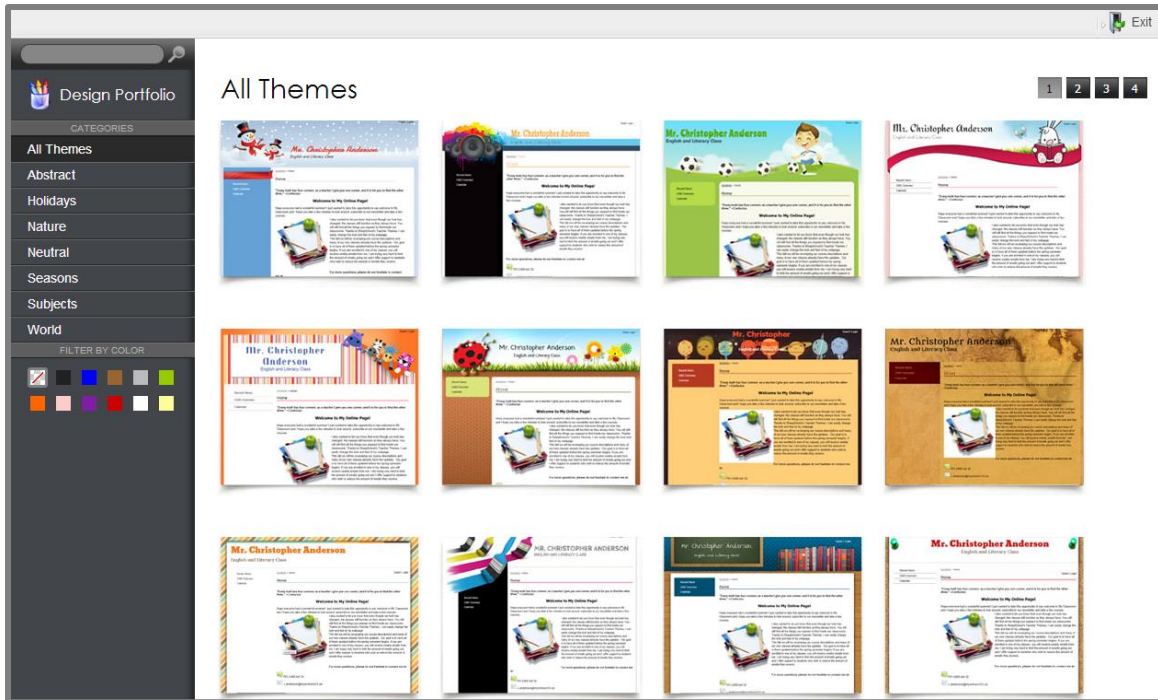
Once you have found a page theme that you like, you can hover your mouse over the theme and click the Preview button to get a better idea of how the theme will look. If you are happy with the theme, click on the theme (but outside of the preview button).
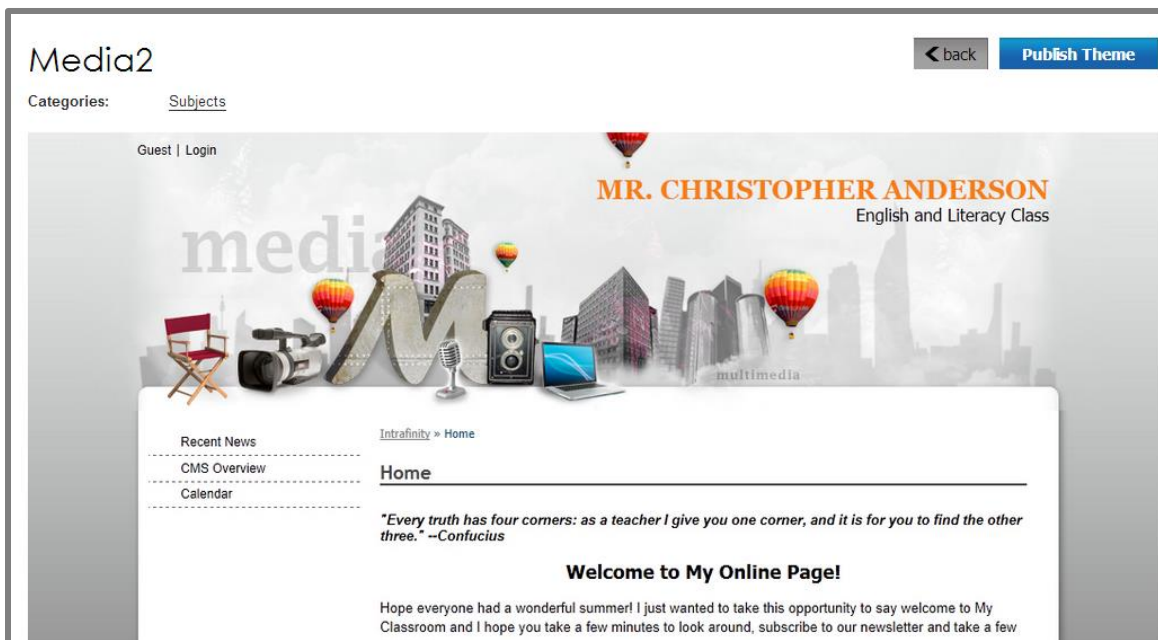
Click **Publish Theme** to confirm your selection.

Note: Because of the way inheritance works, by default all sub-pages of this page will also bear this new theme. If you do not wish that to be the case, you will need to set the theme(s) on the sub-pages as well.

Once you have set your new page theme, you can also set a header for the page. To do so, go to **Page Properties** -> **Metadata** -> **General Metadata**. At or near the bottom of the window that comes up you will see two fields, **Header Line 1** and **Header Line 2**. Any text you type in these two fields will be made part of the header.

Once you have completed your change, click **Submit**, close the Metadata window and refresh your page to see the change. Any sub-pages that are inherited this theme will also inherit your new header.

5) Save as Page Type

After creating a page with a particular range of portlets, administrators have the ability to save it as a page type. This page type will then be available to all users on the system. This tool allows you to save the page you have open as a page type or template for use later on. Only administrators have the ability to create page types. Therefore, a detailed description on how to create and add custom page types has been included in the *Administrator Manual*.

6) New Portlet

Only administrators have the ability to create new portlets. Therefore, a detailed description on how to create and add custom portlets has been included in the *Administrator Manual*.

7) New Content Page

In addition to the **Add New Page** option under **Page Properties**, you also have the ability to add **Content Space Pages** by clicking on the **New Content Page** option under the **Advanced** menu.

8) New External Link Page

An **External Link Page** allows you to create links on your website that route to either an external website or a page within your current website or a document. Details on how to add and maintain an **External Link Page** have been included in the *External Link Page* manual.

9) Import new XML Page

Only administrators have the ability to **Import New XML Pages**. Therefore, a detailed description has been included in the *SitePublish Administrator Manual*.

10)   Move Page

Only administrators have the ability to move pages. Therefore, a detailed description has been included in the *SitePublish* Administrator Manual.

11) Copy Page

Only administrators have the ability to copy pages. Therefore, a detailed description has been included in the *SitePublish* Administrator Manual.

12) View Local Portlets

Only administrators have the ability to *View Local Portlets*. Therefore, a detailed description has been included in the *SitePublish* Administrator Manual.

Advanced Menu Summary

You must select the layout of the page before adding portlets to it

Most portlets are for technical users, the most common portlet used by non-technical users are content portlets and web

You can add a new content space page by clicking on New Content Page

You can change the page title and ownership and also schedule follow-up tasks for pages from the **Page Properties** section under the **Advanced** menu bar

To access portlets, always switch to design mode

External Link pages route to an external site or a page within your current site, or a document